

APPENDUM 2A

A. Required Veteran Services Entered in TrackOne

Step 1: Once logged in and customer is located, using the “Find Client” search, select the “Service” screen

TrackOne
User Home Case Management
Add New Client Find Client
Bading, Frank
110-60-7845
5/10/1964
Case Management
Client Home Page
Reminders/Tasks
Edit Participant
Work History
Enrollment and Application
Services
Goals
Case Notes
Credentials
Test Results
Print ISS
TAA Forms
Administration
Administrative File Review
Additional Participant Information
Home Address:
Zip Code:
City:
State:
County: -- SELECT --
Home Phone:
Work Phone:
Msg Phone:
Cell Phone:
Email Address:
Highest Grade Completed: -- SELECT --
Highest Degree Attained: -- SELECT --
Unemployment Insurance (UI) Status: -- SELECT --
Citizenship: -- SELECT --
Org/Region Information-These values will be automatically assigned by the system
Created By Org ID:
Organization Name:
New Region Code:
Old WSA Code:
Date Created:
Previous Finish Pause Cancel

Step 2: To add a VET service, click the “Add New” button. This will take you to the activity screen

TrackOne
User Home Case Management
Add New Client Find Client
Szedenik, Princess
111-11-1111
12/25/1980
Case Management
Client Home Page
Reminders/Tasks
Edit Participant
Work History
Enrollment and Application
Services
Goals
Case Notes
Credentials
Test Results
Print ISS
TAA Forms
Administration
Administrative File Review
Activities
The client's activities/services are displayed below. The most recent items are listed first.
To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.
Add New Cancel
3 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
1/30/2008	Work w/ client to develop job search plan	WIA-Adult	Employment Plan	N2	1/30/2008	
11/9/2007	1-on-1 Counseling and Career Planning	WIA-Adult	Counseling and Career Planning	N4	11/9/2007	11/9/2007
11/9/2007	Self-help - Assessment - Generic	Core Services	Informational/Self-Service	C9	11/9/2007	11/9/2007

Step 3: At the “Add an Activity” page, click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream screen.

TrackOne ClientTrack.Net - Microsoft Internet Explorer

Lidria Romero - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Szedenik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration



- Administrative File Review

WIA Activities-Master

Activity

To add an activity, enter the following information.

Begin Date:* 02/01/2008

Activity/Service Title:*  

Funding Stream:

Line Code:

Service Type:

Provider:

Training Provider ID:

O*Net Code:

O*Net Title:

Summary Description:

Status:* Active

Planned End Date:* 02/01/2008

Actual End Date:

Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Step 4: In “Category” select the appropriate category according to what services you provided the VET customer (Most of the time, it’s either “Core Service” or “Staff Assisted”).

TrackOne ClientTrack.Net - Microsoft Internet Explorer

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User Home Case Management

Add New Client Find Client

Szedenik, Prin
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Ap
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File

WIA Activities-Master

Available Services By Funding Stream

Select the **Funding Stream** (only the ones for which this client is currently eligible are shown), and click **Search** to display a list of available services .
You can use the **Category** and **Service Type** selections to narrow the search. The **Service Title** box will match all titles containing the text in the box, for the selected **Funding Stream**.
Click on an item in the list to place the client into the selected service.

Funding Stream:* SELECT --

Category: SELECT --

Service Type: SELECT --

Service Title:

Search Cancel

Step 5: Click "Search." A page displaying "Available services by funding stream" should show. Click on the appropriate Service Type. You will then be directed back to the "Activity" screen. **Note:** There are various services that may be selected for VET services (select most appropriate).

ClientTrack.NET Search - Windows Internet Explorer

https://www.trackone-in.com/9.2.2/SearchPopup.aspx?FormID=100000199&MAP-ProviderID=1000005092_DynamicFormRendered1&ClientID=99732&MAP-ProgramName=100000

Norton 360 No fraud detected

Available Services By Funding Stream

Select the **Funding Stream** (only the ones for which this client is currently eligible are shown), and click **Search** to display a list of available services. You can use the **Category** and **Service Type** selections to narrow the search. The **Service Title** box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream: * -- SELECT --
Category: 2 Core - Staff-Assisted
Service Type: -- SELECT --
Service Title:

9 records found.

Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Referral to Employment	Staff-assisted - Referral to Employment	CE
WIA-Adult	Staff Assisted Job Search	Staff-assisted - Job Search	CS
WIA-Adult	Staff Assisted Job Search	Workshop - Job Search	CS
WIA-Adult	Support Service Referral	Resource Directory Referral	CV
WIA-Adult	Other Core Services	Staff-Assisted - Assessment - Generic	C2
WIA-Adult	Other Core Services	Workshop - Career Interest or Assessment	C2
Core Services	Workforce Information Service	Staff-Assisted - Labor Market Information	C8
Core Services	Workforce Information Service	Workshop - Labor Market Information	C8
Core Services	Work Keys Referral	WorkKeys Referral	CK

Internet | Protected Mode: On 100%

Step 6: Once back in "Activity" page, Select "Case Notes" to describe the service provided

ClientTrack.Net - Windows Internet Explorer

https://www.trackone-in.com/9.2.2/MainPage.aspx?PageID=1&PrimaryKey=LER&ClientScreenWidth=1016&ClientScreenHeight=703&InitialContent=&InitialPage=

Norton 360 Fraud monitoring is on

TrackOne @Work Solutions

Lidria Romero - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Szednik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
 - Goals
 - Case Notes
 - Credentials
 - Test Results
 - Print ISS
 - TAA Forms
- Administration
 - Administrative File Review

WIA Activities-Master

Activity

To add an activity, enter the following information.

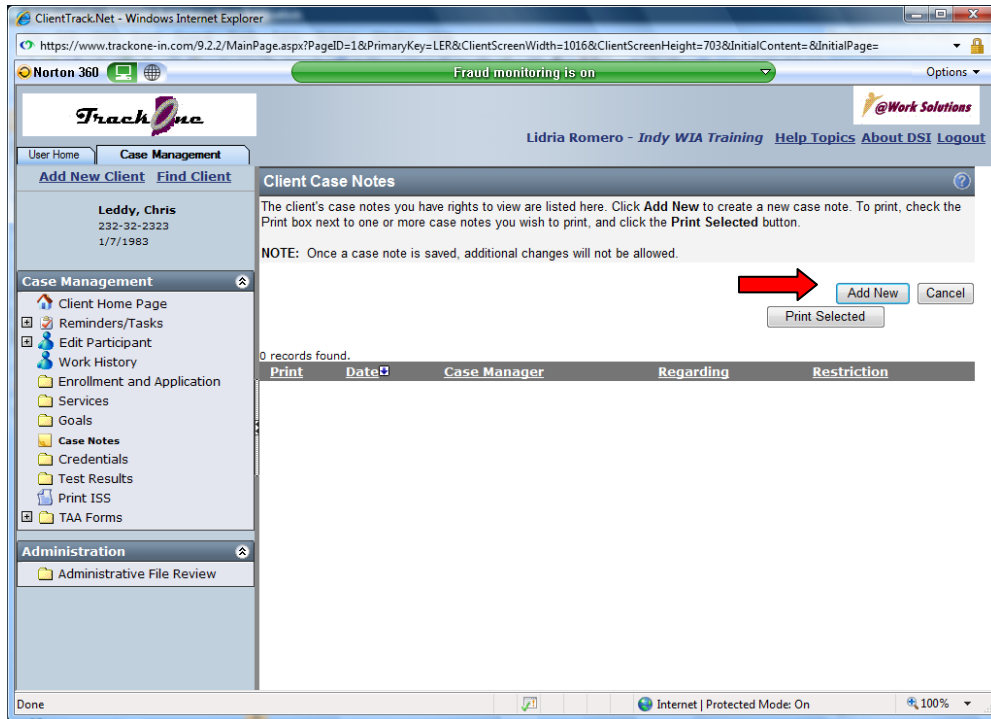
Begin Date: * 02/06/2008
Activity/Service Title: * Staff-assisted - Referral to Employment
Funding Stream: WIA-Adult
Line Code: CE
Service Type: Referral to Employment
Provider: Indiana WorkOne System
Training Provider ID:
O*Net Code:
O*Net Title:
Summary Description:
Status: * Active
Planned End Date: * 02/06/2008
Actual End Date:
Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

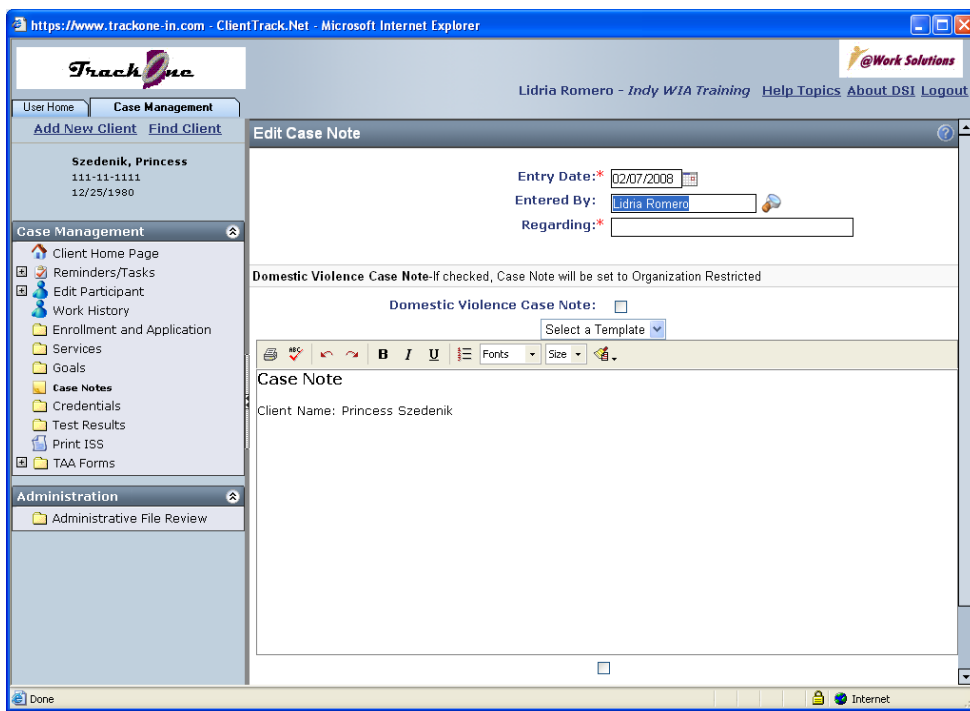
Service Notes:

Done Internet | Protected Mode: On 100%

Step 7: Enter in Case Note: Describe the service being provided to the veteran (for example, working on a resume, preparing for an interview, or dealing with a VA or GI Bill question); and, describe details that show the depth of service being provided to the veteran (for example, jobs/employers to which resumes were mailed, details about the interview preparation activity, or suggestions for addressing the VA or GI Bill questions that were raised).



Step 8: After entering the case note, ensure the spelling and grammar are correct before selecting "Save". In "Case Note" page (seen below), select "Save" (may need to scroll down).



B. Service Strategy Development

Step 1: Enter a "Service"

Additional Participant Information

Home Address:

Zip Code:

City:

State:

County:

Home Phone:

Work Phone:

Msg Phone:

Cell Phone:

Email Address:

Highest Grade Completed:

Highest Degree Attained:

Unemployment Insurance (UI) Status:

Citizenship:

Org/Region Information-These values will be automatically assigned by the system

Created By Org ID:

Organization Name:

New Region Code:

Old WSA Code:

Date Created:

Previous Finish Pause Cancel

Step 2:

The "Activities" screen, displays the Customer's *Service Strategy* and/or *IEP*. All Services/Activities added should be displayed on this screen. In the "Activity" screen, click "Add New" to add an activity to the Customer's *Service Strategy* and /or *IEP*.

Activities

The client's activities/services are displayed below. The most recent items are listed first. To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.

3 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
1/30/2008	Work w/ client to develop job search plan	WIA-Adult	Employment Plan	N2	1/30/2008	
11/9/2007	1-on-1 Counseling and Career Planning	WIA-Adult	Counseling and Career Planning	N4	11/9/2007	11/9/2007
11/9/2007	Self-help - Assessment - Generic	Core Services	Informational/Self-Service	C9	11/9/2007	11/9/2007

Add New Cancel

Customer's Service Strategy. "Service Type" category will either list Service "Strategy/Name of Activity" or "IEP/Name of Activity"

Step 3:

At the “Add an Activity” page, click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream screen.

The screenshot shows the 'Add Activity' page in the TrackOne ClientTrack.Net application. The left sidebar contains navigation links for 'Case Management' (Add New Client, Find Client) and 'Administration' (Administrative File Review). The main content area is titled 'WIA Activities-Master' and 'Activity'. It contains a form with the following fields: 'Begin Date' (02/01/2008), 'Activity/Service Title' (with a magnifying glass icon highlighted by a red arrow), 'Funding Stream', 'Line Code', 'Service Type', 'Provider', 'Training Provider ID', 'O*Net Code', 'O*Net Title', 'Summary Description', 'Status' (Active), 'Planned End Date' (02/01/2008), 'Actual End Date', and 'Record Created By'. A 'Service Notes' field is at the bottom.

Step 4: In “Category”, select the appropriate “Category” and/or “service type” in the drop down menus.

The screenshot shows the 'Available Services By Funding Stream' search window. The window title is 'https://www.trackone-in.com - ClientTrack.NET Search - Microsoft Internet Explorer'. The main content area contains the following fields: 'Funding Stream' (dropdown menu), 'Category' (dropdown menu), 'Service Type' (dropdown menu), and 'Service Title' (text box). There are 'Search' and 'Cancel' buttons at the bottom right. The background shows the same 'Add Activity' page as in the previous screenshot.

Step 5: Click “Search.” A page displaying “Available services by funding stream” should show. Most times, either Category “3” or “6” is chosen. The page below displays the service types under “3 Intensive- Sign. Staff Assist.” Choose the best that applies by clicking on the service type.

Available Services By Funding Stream

Select the **Funding Stream** (only the ones for which this client is currently eligible are shown), and click **Search** to display a list of available services. You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream: * -- SELECT --
 Category: 3 Intensive - Sign. Staff Assist
 Service Type: -- SELECT --
 Service Title:

Search Cancel

16 records found.

Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Employment Plan	Work w/ client to develop job search plan	N2
WIA-Adult	Employment Plan	ISS/IEP Review & Update Session	N2
WIA-Adult	Employment Plan	Initial ISS/IEP Development Session	N2
WIA-Adult	Short Term Prevocational Training	Short-term Prevocational Training - Generic	N6
WIA-Adult	Short Term Prevocational Services	Short-term Prevocational Services - Generic	NP
WIA-Adult	Relocation Expenses	Relocation Expenses - Generic Item/Vendor	NR
WIA-Adult	Internship/Cooperative Experience (Adult)	Internship/Cooperative Exp (Adult) - Generic	14
WIA-Adult	Work Experience (Adult)	Work Experience - Generic	01
WIA-Adult	Comprehensive Assessment	1-on-1 Counseling - In-depth assessment session	NA
WIA-Adult	Comprehensive Assessment	Group Counseling - Assessment results reviewed	NA
WIA-Adult	Comprehensive Assessment	1-on-1 Counseling - Assessment results reviewed	NA
WIA-Adult	Other Case Management Services	Budget Counseling for training	N1
WIA-Adult	Other Case Management Services	Budget Counseling - General	N1
WIA-Adult	Other Case Management Services	Work w/ client to customize LMI research	N1
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling - Customer Crisis/Issue	N4
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling and Career Planning	N4

Step 6: After selecting, TrackOne will revert to the “Activity” page. Some entries may be automatically filled in, but you must complete all other asterisked items. Click “save”

TrackOne

Lidria Romero - Indy WIA Training Help Topics About DS1 Logout

Use Home Case Management

Add New Client Find Client

Szedek, Princess
111-11-1111
12/25/1900

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentals
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

WIA Activities-Master

Activity

To add an activity, enter the following information.

Begin Date: * 02/01/2008

Activity/Service Title: *

Funding Stream:

Line Code:

Service Type:

Provider:

Training Provider ID:

O*Net Code:

O*Net Title:

Summary Description:

Status: * Active

Planned End Date: * 02/01/2008

Actual End Date:

Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date:

Save Pause Cancel

Step 7: Case Note

After saving in the "Activity" page, go to "Case Notes" page to record

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Lidria Romero - Indy WIA Training Help Topics About DSI Logout

User Home **Case Management**

Add New Client Find Client

Szednik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application**
 - Services
 - Goals
 - Case Notes** (indicated by a red arrow)
 - Credentials
 - Test Results
 - Print ISS
 - TAA Forms

Administration

- Administrative File Review

Enrollment and Application

The list below displays the client's enrollments/applications. An enrollment is automatically created when a Core Service is created for a new client. To create an application for Intensive Services, select the **Create Application** option from the **Action** menu next to the Enrollment record. To edit an existing application, select **Edit Application**. Use the **Accounts** menu item to attach ITA or Supportive Services accounts to the enrollment. Use **Monthly Contacts** and **Follow-Up** to record regular contacts with the client.

Cancel

1 records found.

Participation Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
11/9/2007		11/9/2007	Danielle Gyuriak	Goodwill - St. Joe	02	Adult

Step 8: Click "Add New" to add a new case note to the customer's Service Strategy

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Lidria Romero - Indy WIA Training Help Topics About DSI Logout

User Home **Case Management**

Add New Client Find Client

Szednik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes** (indicated by a red arrow)
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Client Case Notes

The client's case notes you have rights to view are listed here. Click **Add New** to create a new case note. To print, check the Print box next to one or more case notes you wish to print, and click the **Print Selected** button.

NOTE: Once a case note is saved, additional changes will not be allowed.

Print Selected **Add New** Cancel

3 records found.

Print	Date	Case Manager	Regarding	Restriction
<input type="checkbox"/> View	2/7/2008	Lidria Romero	test	Unrestricted
<input type="checkbox"/> View	2/5/2008	Lidria Romero	IEP Review & Update	Unrestricted
<input type="checkbox"/> View	2/5/2008	Lidria Romero	Service Strategy- ONE on ONE Counseling	Unrestricted

Step 9:

In the “Edit Case Note” screen, the “Entry Date” and “Entered by” will automatically be filled in by TrackOne. In the “Regarding” box, the case note entered should be titled: “Service Strategy/Name of the Activity.” Example: “Service Strategy/Staff Assisted Job Search”, “Service Strategy/TABE”, or “Service Strategy/ Scheduled for Product Activity.” Follow procedure manual for Case Note material. Click “Save” when done.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Lidia Romero - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Szedenik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes**
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Edit Case Note

Entry Date:* 02/07/2008

Entered By: Lidia Romero

Regarding:*

Domestic Violence Case Note-If checked, Case Note will be set to Organization Restricted

Domestic Violence Case Note: ☐

Select a Template

Case Note

Client Name: Princess Szedenik

Note-Additional changes to this case note will not be possible after it is saved

Save **Pause** **Cancel**

C. IEP

Follow Steps 1-7 in Section B. In Step 5, on the page displaying “Available services by funding stream” choose the correct “Service Type” and click “search.” The page displaying the service types is displayed. Choose the best *Service Type* that applies.

Step 8: Click “Add New” to add a new case note to the customer’s IEP

The screenshot shows the ClientTrack.Net web application in a Microsoft Internet Explorer browser window. The address bar displays "https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer". The page header includes the TrackOne logo, the user name "Lidria Romero - Indy WIA Training", and links for "Help Topics", "About DSI", and "Logout".

The left sidebar contains a "Case Management" section with a search bar for "Szedenik, Princess" (111-11-1111, 12/25/1980) and a list of navigation options: Client Home Page, Reminders/Tasks, Edit Participant, Work History, Enrollment and Application, Services, Goals, Case Notes, Credentials, Test Results, Print ISS, and TAA Forms. Below this is an "Administration" section with "Administrative File Review".

The main content area is titled "Client Case Notes" and includes a help icon. It contains instructions: "The client's case notes you have rights to view are listed here. Click **Add New** to create a new case note. To print, check the Print box next to one or more case notes you wish to print, and click the **Print Selected** button." A note states: "NOTE: Once a case note is saved, additional changes will not be allowed." Buttons for "Add New", "Cancel", and "Print Selected" are visible.

Below the instructions, it says "3 records found." and displays a table of case notes:

	Print	Date	Case Manager	Regarding	Restriction
View	<input type="checkbox"/>	2/7/2008	Lidria Romero	test	Unrestricted
View	<input type="checkbox"/>	2/5/2008	Lidria Romero	IEP Review & Update	Unrestricted
View	<input type="checkbox"/>	2/5/2008	Lidria Romero	Service Strategy- ONE on ONE Counseling	Unrestricted

The bottom of the browser window shows a status bar with "Done" and "Internet" icons.

Step 9:

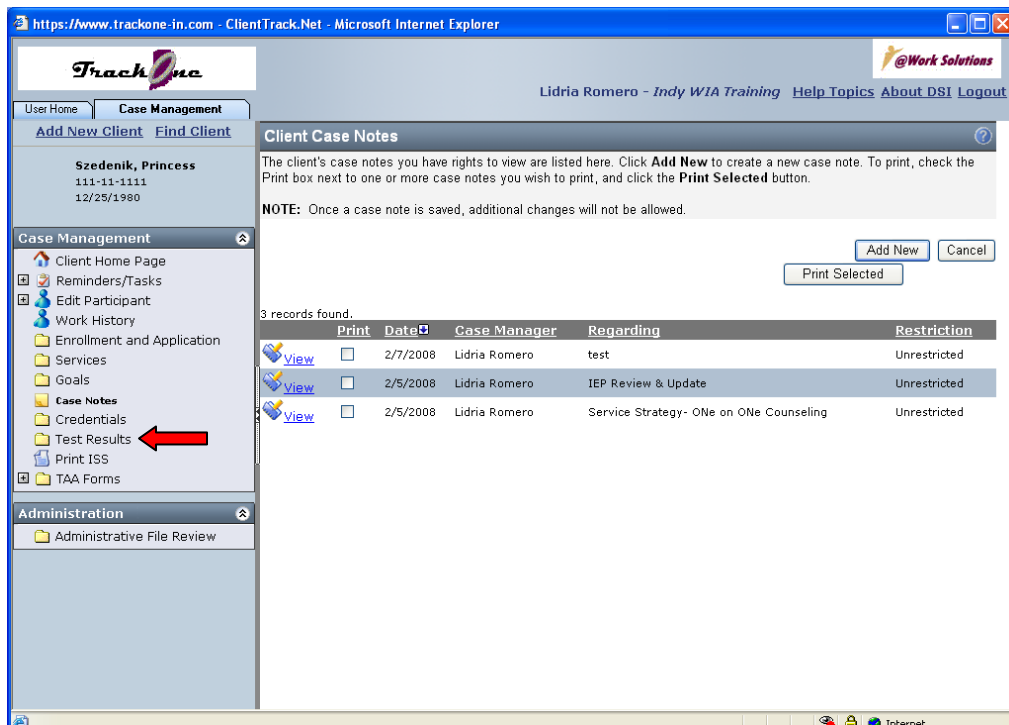
In the “Edit Case Note” screen, the “Entry Date” and “Entered by” will automatically be filled in by TrackOne. In the “Regarding” box, the case note entered should be titled: “IEP/Name of the Activity.” Example: “IEP/On-the-Job Training”, “IEP/Customized Training”, or “IEP/Occupational Training.” Follow procedure manual for Case Note material. Click “Save” when done.

The screenshot shows the 'Edit Case Note' screen in the TrackOne web application. The browser address bar shows 'https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer'. The application header includes the TrackOne logo, user information 'Lidria Romero - Indy WIA Training', and links for 'Help Topics', 'About DSI', and 'Logout'. A left sidebar contains navigation menus for 'Case Management' (with links like 'Add New Client', 'Find Client', and a list of client-related actions) and 'Administration' (with 'Administrative File Review'). The main content area is titled 'Edit Case Note' and contains fields for 'Entry Date' (02/07/2008), 'Entered By' (Lidria Romero), and 'Regarding' (empty). Below these is a section for 'Domestic Violence Case Note' with a checkbox and a 'Select a Template' dropdown. A rich text editor with a toolbar (bold, italic, underline, font color, size) is present, with the text 'Case Note' and 'Client Name: Princess Szedenik' already entered. At the bottom, a note states 'Note-Additional changes to this case note will not be possible after it is saved'. A red arrow points to the 'Save' button, which is next to 'Pause' and 'Cancel' buttons.

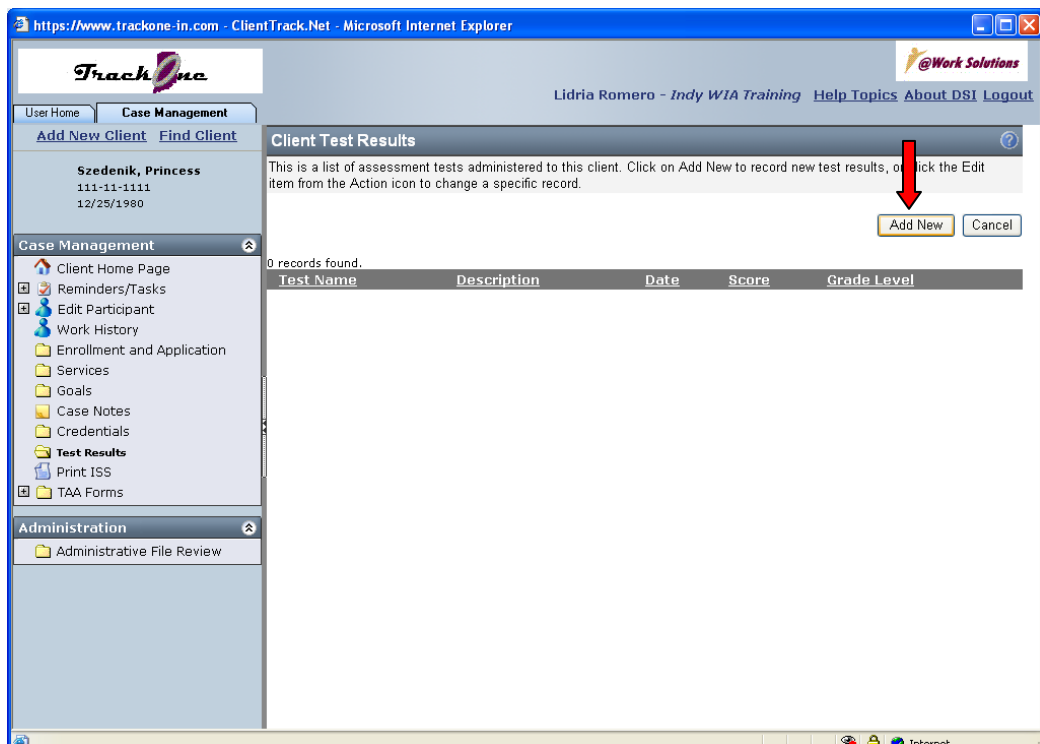
D. Additional Assessment

Follow Steps 1-9 in Section "B" to enter a "Service". In Step 5, on the page displaying "Available services by funding stream" choose the correct "Service Type" and click "search." The page displaying the service types displays. Choose the best *Service Type* that applies.

Step 10: After clicking "save" in the "case note" page, and to record a TABE, WorkKeys, or CASAS Test, click on "Test Results."



Step 11: Click on "Add New"



Step 12:

In the “Test and Test Result” page, fill in all appropriate fields. Click “Save.”

The screenshot shows the TrackOne web application interface. The browser address bar displays "https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer". The page header includes the TrackOne logo and user information: "Lidria Romero - Indy WIA Training". The sidebar on the left contains navigation links under "Case Management" (Add New Client, Find Client) and "Administration" (Administrative File Review). The main content area is titled "Indy WIA Test Results" and "Test and Test Results". It includes instructions for identifying tests and a section for "WIA Youth Literacy and Numeracy Gains Measures". The form fields are: Test Name (dropdown), Test Type (dropdown), Date (calendar icon), Score (text input), Grade Level (text input), and Passing/Competent (checkbox). A red arrow points to the Save button, which is next to the Pause and Cancel buttons.

E. Product Activities: Record in TrackOne

Follow Steps 1-9 in Section "B" to enter a "Service." In Step 5, on the page displaying "Available services by funding stream" choose the correct "Service Type" and click "search." The page displaying the service types displays. Choose the best *Service Type* that applies.